



Introduction to the 2025 NDSASP and NDAEIS



Project Team

Kimley»Horn

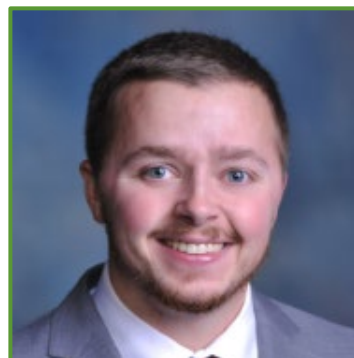
Expect More. Experience Better.



Kyle Wanner
Executive Director



Adam Dillin
Airport Planner, East



Grant Erwin
Airport Planner, West



Regan Schnug
Senior Advisor

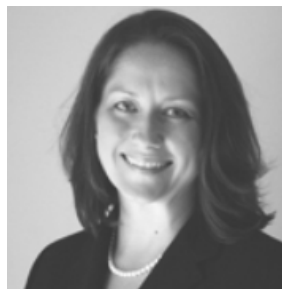


Pam Keidel-Adams
Principal-in-Charge



Georgia Twyerould
Project Manager

Joined by:



Summer Marr



Sarah Arnold



TAC Members

NDAC

*Mike McHugh
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FAA Airports District Office

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Grand Forks Intl Airport

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Agenda

1

Project Overview

2

ND Aviation System Overview

3

2025 NDSASP Update

4

2025 NDAEIS Update

5

Next Steps



Project Overview



Project Purpose



2025 North Dakota
State Aviation System Plan



2025 North Dakota
Aviation Economic Impact Study

Update to 2014 NDSASP

- Provides roadmap for long-term planning
- Guides future decision making
- Identifies system needs










Update to 2015 NDAEIS

- Documents contributions of public-use airports
- Justifies continued investment
- Helps communicate airport benefits and value



-  Virtual TAC Meeting
-  Regional Presentations
-  Fly ND Conference

Project Timeline

Task	Month	2024				2025								2026													
		S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A		
Task 1	Study Design																										
Task 2	Project Management																										
Task 3	Stakeholder Engagement																										
Task 4	2025 NDSASP Framework (Goals, Performance Measures, Benchmarks)																										
Task 5	Airport Classification																										
Task 6	System Inventory																										
Task 7	Activity Forecasts																										
Task 8	System Performance																										
Task 9	Issues and Industry Advancements																										
Task 10	Recommendations and Cost Estimates based on Findings																										
Task 11	Economic Impact Study																										
Task 12	2025 NDSASP and NDAEIS Final Documents																										
Task 13	Website Story Maps and GIS Development																										



NDSASP-AEIS Deliverables



Technical Plan



Executive Summary



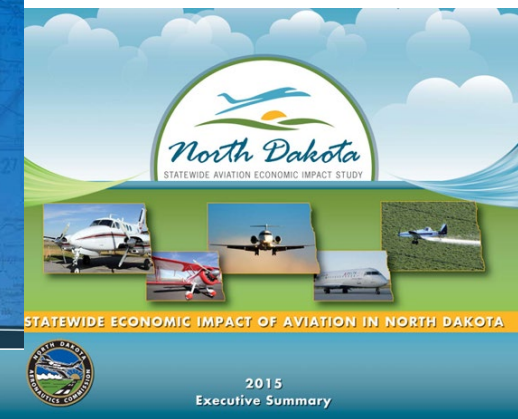
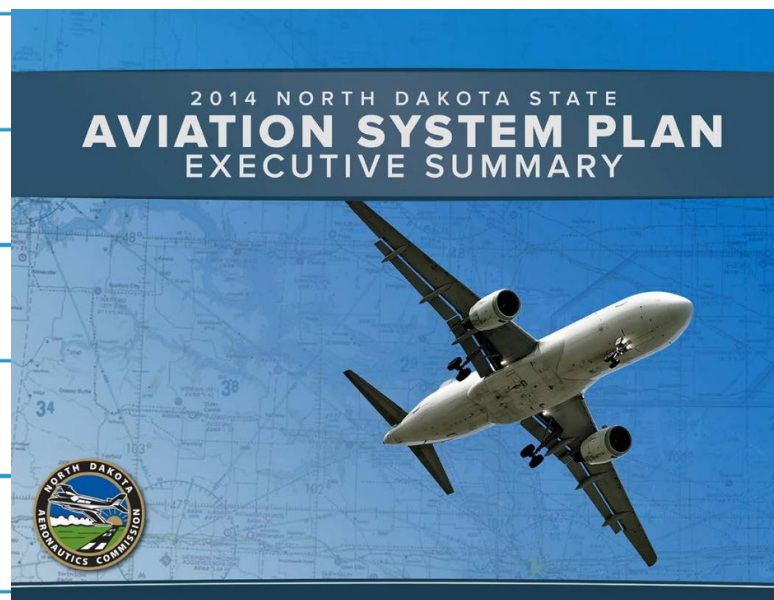
Fact Sheet



Individual Airport Reports (65 airports)



Story Maps (Up to 8)





Story Maps



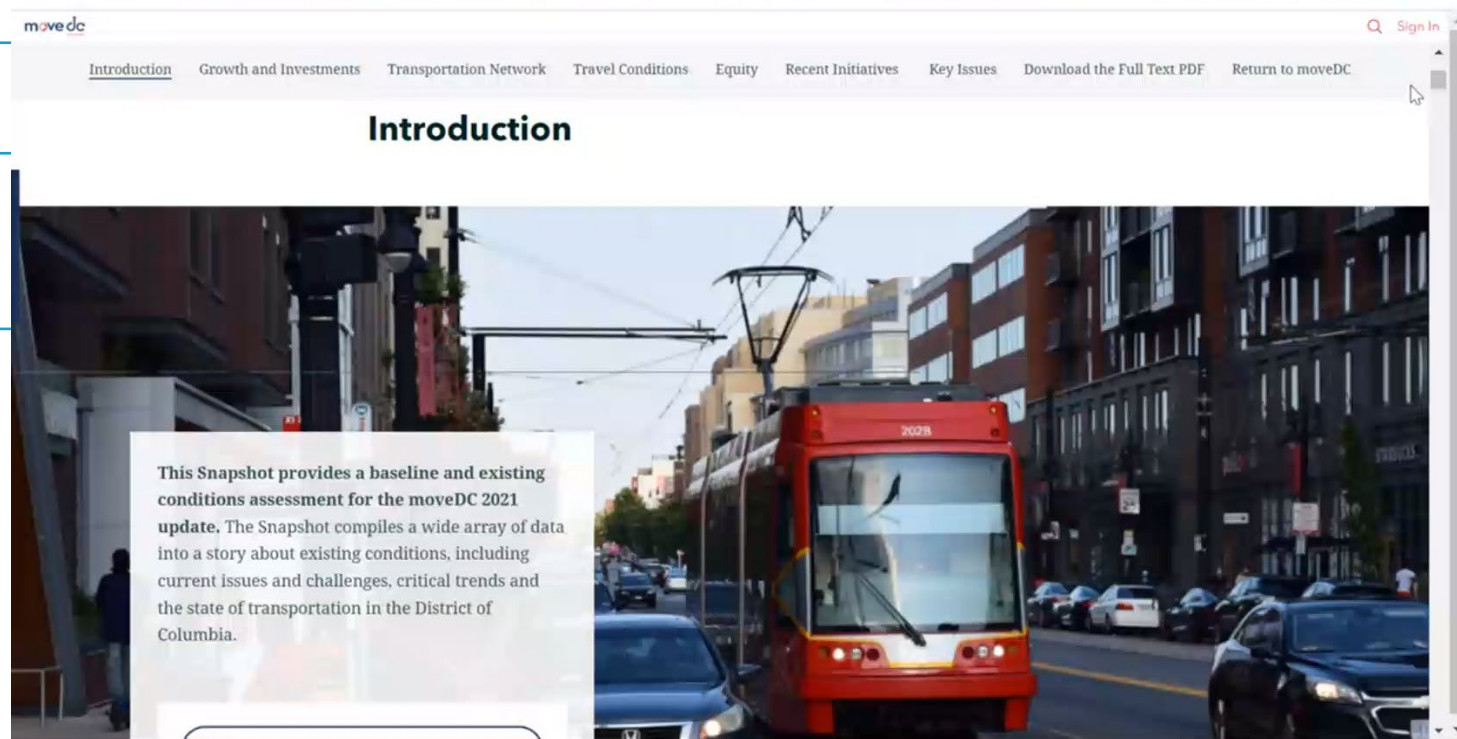
Web-based deliverable



Visually presents
system changes



Represents several
topics identified by
NDAC





Project Website



<https://2025ndsasp.com/>



Project Overview

The 2025 North Dakota State Aviation System Plan (NDSASP) is an update to the 2014 NDSASP. The study is used by the North Dakota Aeronautics Commission (NDAC) as a guide for future decision making. The study will identify system needs and changes since the last study and will provide recommendations to preserve and enhance the state's 89 public-use airports.

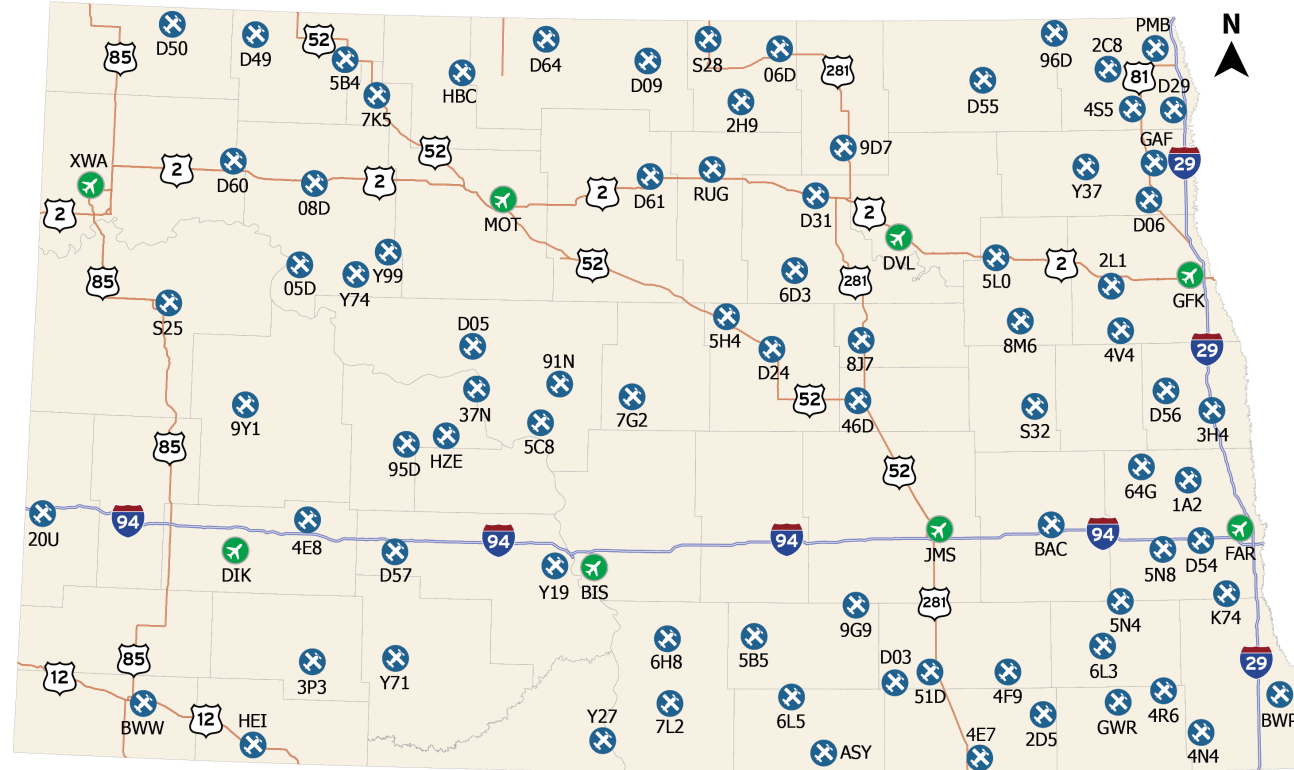
The project will begin by establishing the 2025 NDSASP framework, which includes setting the goals and metrics that will drive the project forward. With goals and metrics established, a comprehensive system inventory task will occur, which includes a data collection effort that will involve direct coordination with airports. With a complete dataset established, airport classifications will be reviewed, activity forecasts will be developed, and the aviation system performance will be analyzed. Following the system performance task, issues and industry advancements will be evaluated, and recommendation and cost estimates will be established. Following all project tasks, the final deliverables will be submitted to the NDAC and used to make informed decisions about North Dakota's aviation system over the long-term planning horizon. As shown in the Project Process graphic below, a comprehensive stakeholder involvement effort will occur throughout the project. In addition, the **2025 North Dakota Aviation Economic Impact Study (2025 NDAEIS)** will be developed in



ND Aviation System Overview



Airports Included in the Study



2025 NDSASP
Public Airports



Commercial
Service



General
Aviation

County
Boundaries

State
Highways

Interstate
Highways



Aviation Activities in North Dakota



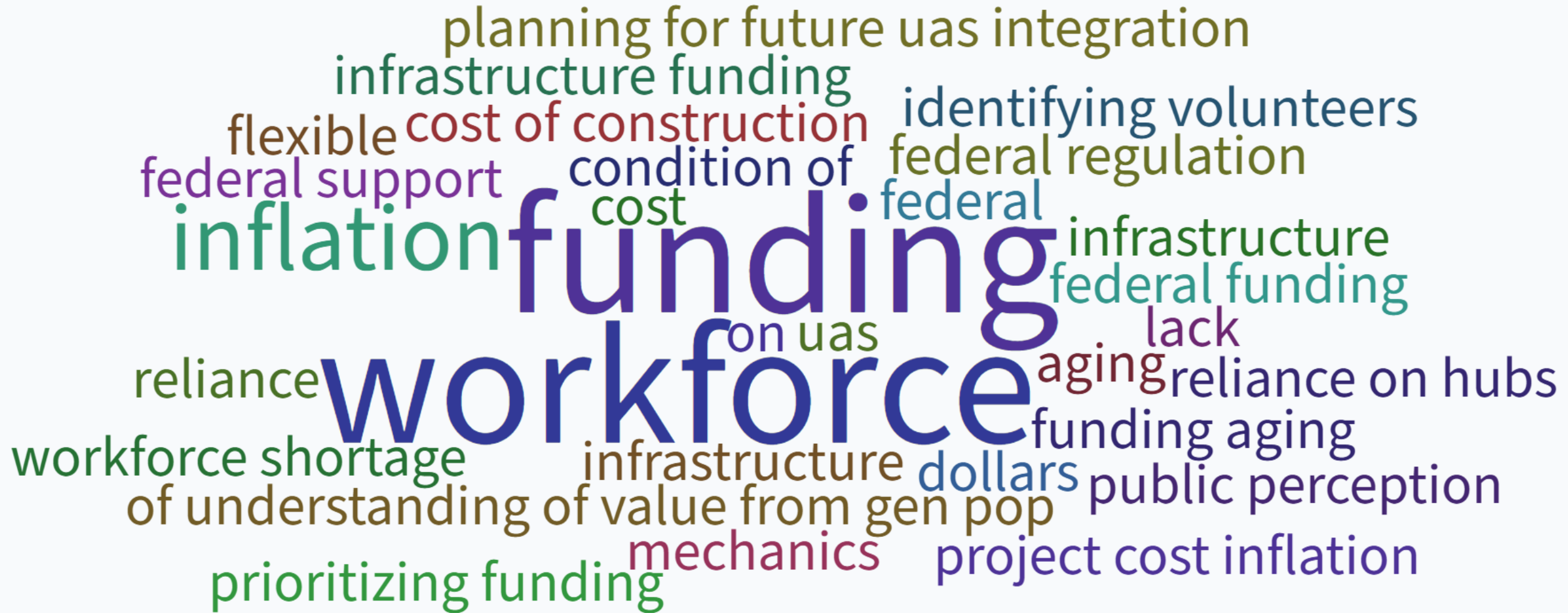


System Strengths

updated infrastructure
 supported increased standard of living
 connecting communities & industries
 collaboration enjoyment work
 ndac flexibility
 network business growth **robust** availability strategic
 state fun **education** we community well
 modern assets growing
 innovation economic growth
 impact balanced adaptable -team
 connectivity- **people** centralized passion
 together integration economic planning
 community outreach investment support
 oriented in-person-connections
 locations spread across the state to create comprehensive network
 throughout



System Challenges

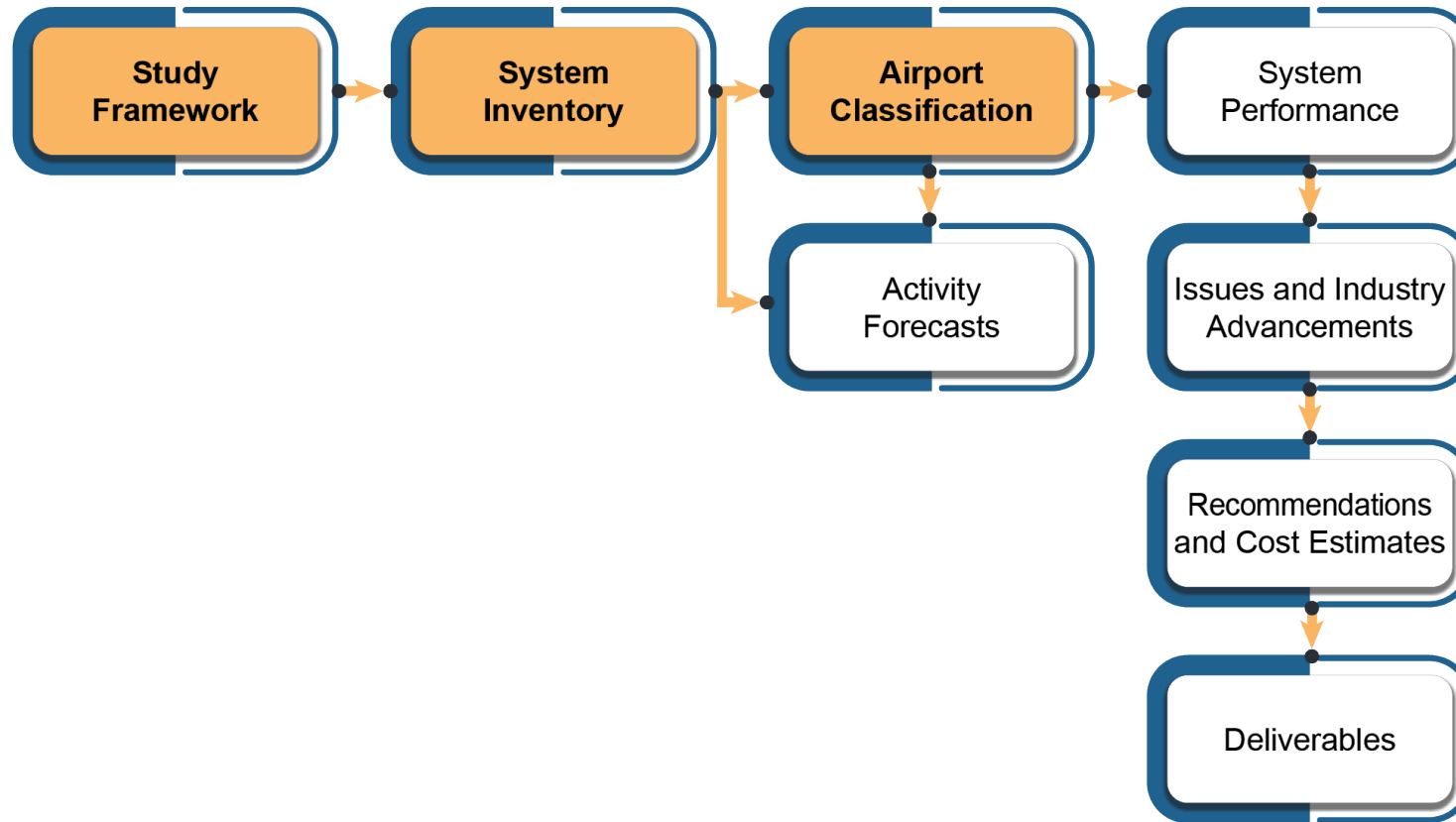




2025 NDSASP Update



Study Process and Ongoing Efforts

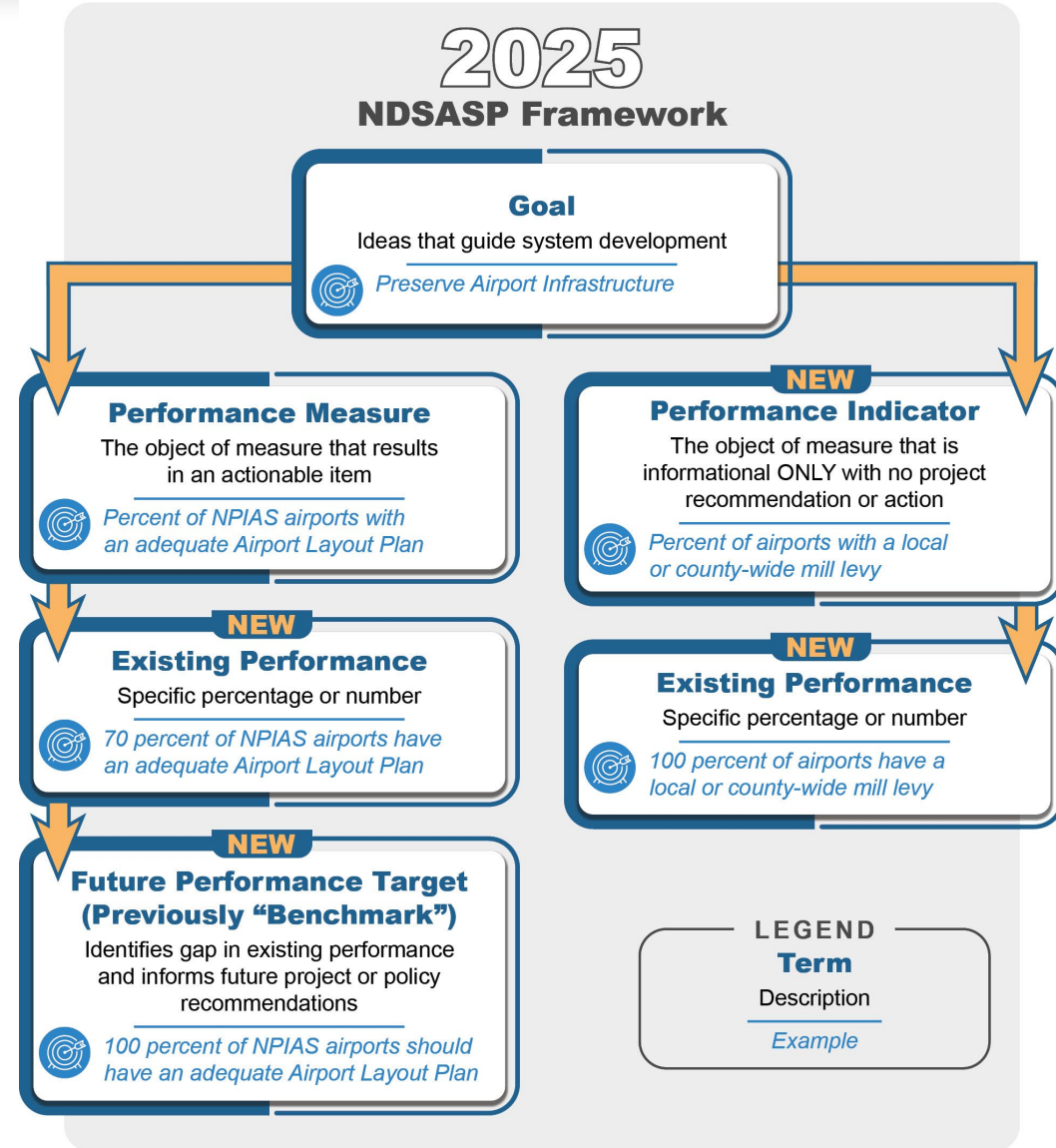


Stakeholder Involvement

North Dakota Aviation Economic Impact Study (NDAEIS)



Study Framework





System Goals



Maintain a Safe Aviation System



Enhance Quality of Life



Promote Aviation System Coverage



Preserve Airport Infrastructure



Provide Air Access to Airports



Support Aviation Education and
Industry Advancement



Maintain a Safe Aviation System

Metric	Metric Type
Percent of airports with clear approaches to all runway ends	Performance Measure
Percent of airports with public gatherings in the RPZs (stadiums, parks, large public or commercial buildings, parking lot, or other similar spaces) for all runway ends	
★ Percent of airports that control RPZs through fee simple ownership or easements for all runways	
Percent of airports with roads, railroads, or structures not utilized for public gatherings in the RPZs for all runway ends	Performance Indicator

★ = New PM or PI to the 2025 NDSASP



Promote Aviation System Coverage

Metrics	Metric Type
Percent of area and population within 90 minutes from a Commercial Service airport	Performance Indicator
Percent of area and population within 30 minutes from a NPIAS airport	
★ Percent of area and population within 30 minutes from all paved public-use airports (NPIAS and Non-NPIAS)	
Percent of area and population within 30 minutes from all public-use airports (NPIAS and Non-NPIAS)	



Provide Air Access to Airports

Metrics	Metric Type
Percent of area and population within 30 nautical miles of an airport with on-site weather reporting (AWOS/ASOS)	Performance Measure
Percent of area and population within 30 nautical miles of an airport with a non-precision approach	
Percent of area and population within 30 nautical miles of an airport with a vertically guided approach	
Percent of airports with adequate terminal facilities to support passenger demand	
★ Percent of airports with available covered aircraft storage	Performance Indicator
★ Percent of airports with standard runway lighting	
Percent of area and population within 50 nautical miles of an airport with Jet A fuel	
Percent of area and population within 30 nautical miles of an airport with 100LL fuel	
★ Percent of NPIAS airports that have at least 95% wind coverage for all runways	



Enhance Quality of Life



Metrics	Metric Type
Percent of area and population within 60 minutes of a 5,000ft or longer runway	Performance Indicator
★ Percent of airports that meet the Light Business Jet Capability criteria	
★ Percent of airports utilized by air cargo operators	
★ Percent of airports with aviation related business tenants on airport property	
Percent of airports that can meet the needs of the King Air emergency aircraft	
★ Percent of area and population within 30-minutes of an airport that can meet the needs of the King Air emergency aircraft (3,800ft runway, ARC B-II Small +, lighted runway, certified weather reporting)	
Percent of area and population within 30 nautical miles of an airport that supports based or transient aerial applicator operations	
★ Percent of airports that provide access to mechanic services: <ul style="list-style-type: none"> - On site and available to the public - On-site private operation only - On-call only - None 	
Percent of airports with a hospital and/or clinic within its service area	



Preserve Airport Infrastructure

Metrics	Metric Type
Percent of airports meeting state PCI thresholds on primary runways	Performance Measure
Percent of NPIAS airports with an adequate Airport Layout Plan	
Percent of airports that have height zoning following Part 77 guidelines adopted by a local zoning board	Performance Indicator
Percent of airports with a local or county-wide mill levy	
Percent of airports with non-mill levy revenue	



Support Aviation Education and Industry Advancement

Metrics	Metric Type
★ Percent of airports that offer flight training	Performance Indicator
★ Percent of area and population within 30 nautical miles of an airport that offers flight training	
★ Percent of airports that host annual fly-ins or other community engagement events	
★ Percent of airports that participate in STEM activities (tours, classroom visits, etc.)	
★ Percent of area and population that have educational opportunities available in the community	



System Inventory

We need your help!

Economic Impact Survey

This information will be used to convey the economic importance of individual airports and the sum of all of North Dakota's public airports. Please provide as much detail as you can to assist the consulting team in data collection efforts.

Types of Aviation Activity

Please use the table below to indicate the type and frequency of different activities that your airport supports. The frequency information you provide will be used by the project team to determine your airport's top five activities.

Activity	Never	Occasional	Seasonal	Monthly	Weekly	Daily
Recreational flying	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flight instruction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agricultural spraying	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corporate/business activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aerial inspections (e.g., pipeline, electrical, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Air cargo	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gateway for recreational visitors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Police/law enforcement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prisoner transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Military training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search & rescue/ civil air patrol	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environmental patrol	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medevac	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physician/medical transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aerial firefighting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aerial photography/surveying	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traffic/news reporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Air shows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Skydiving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gleeters/soaring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Page 14 of 18

Airport Manager Survey for General Aviation Airports

The North Dakota Aeronautics Commission (NDAC) requests your participation in providing essential data to be used by NDAC and the consultant team, Kimley-Horn, for the 2025 North Dakota State Aviation System Plan (2025 NDSASP) and 2025 North Dakota Aviation Economic Impact Study (NDAEIS) updates.

A member of the Kimley-Horn team will be contacting your airport to schedule either a virtual or in-person site visit to discuss the Airport Manager Survey and answer any questions you may have on this form. Please complete as much of the form as possible ahead of your scheduled site visit and return to Georgia.Twyer@nd.gov or Georgia.Twyer@kimley-horn.com. The site visit will be used to ensure a complete dataset for the study.

If you have any questions about this form or the NDSASP/NDAEIS update, please contact Adam Dillin of the North Dakota Aeronautics Commission at 701-328-0657 or via email at adillin@nd.gov or Georgia.Twyer@kimley-horn.com at 720-773-2682 or via email at Georgia.Twyer@kimley-horn.com.

Airport Contact Information

Does your airport have a dedicated on-site airport manager? YES NO

Survey Respondent: This data request was completed by: _____

Cell/Alternate Phone: _____ Title: _____

_____ 3-Letter ID: _____ Date: _____

_____ Email: _____

Page 1 of 3

- **Airport Manager Surveys Distributed**
 - Includes NDSASP and NDAEIS questions
- **Scheduling Site Visits**
 - 81 virtual site visits
 - 8 in-person site visits



Airport Classifications

- Using the 2025-2029 NPIAS
- Same Classification Methodology as 2014 NDSASP

	2025 NDSASP Classification	# of Airports
NPIAS Airports	Commercial Service	8
	Local	26
	Basic	19
Non-NPIAS Airports	Community Paved	18
	Community Turf	18
	Total	89



2025 NDAEIS Update



NDAEIS Process

Data Collection

- **On-Airport**
 - Airport Administration
 - Tenants
- **Off-Airport**
 - Visitor Spending

Data Analysis

- **Calibrate Economic Model**
- **Economic Modeling**
- **Estimation of Tax Revenues from Aviation**

Deliverables

- **Technical Plan**
- **Executive Summary**
- **Individual Airport Reports**
- **Fact Sheet**
- **GIS Story Maps**



Sources of Direct Economic Impact

On-Airport

Airport Administration



Employment (Full and Part-Time)



Payroll (Wages and Benefits)



Operating Expenses



Capital Improvements

Airport Business Tenants



Employment
(Full and Part-Time)



Capital Improvements

Off-Airport

Visitor Spending



Commercial Service Visitor Spending



General Aviation Visitor Spending



Measures of Economic Impact



Jobs

Total number of people employed, both full-time and part-time because of aviation



Earnings

Total employment compensation, including wages and benefits, of those employed



Gross Domestic Product (GDP)

Dollar value of final goods and services produced locally because of economic activity, not including the value of intermediate goods and services used to produce the final goods and services



Output

Total expenditures associated with airport administration, capital projects, tenant sales of goods and services, as well as visitor spending in North Dakota's hospitality-related sectors



Categories of Economic Impact

Direct Impacts

The initial impacts occurring both on- and off-airports, involving the payroll, expenditures, and capital improvements of airports and tenants are considered direct impacts. This also includes the spending by commercial and general aviation visitors.

Multiplier Impacts

There are two distinct impacts that occur within the broader “multiplier impacts” term. The first is “indirect impacts” which occur when a portion of direct revenues is used to purchase goods and services from other businesses within a defined region. These impacts are sometimes referred to as “supplier sales.” The second is “induced impacts”, which are sometimes referred to as “income respending” and occur when employees re-spend their income earned in the defined region as a part of direct and indirect impacts.

Total Impacts

Total impacts are simply the sum of the direct and multiplier impacts (induced and indirect).



Supplemental NDAEIS Tasks

- **University of North Dakota - Off Airport Activity & Impacts**
- **Benefits of Aircraft and Aerospace Manufacturing**
- **Survey of AAM and UAS Businesses Impacts**
- **Economic Impact from Air Force Bases**
- **Impact Losses as a Result of Workforce Development Issues**

A small, high-wing aircraft is parked on a grassy field. The image is overlaid with a semi-transparent orange gradient. The word 'SCOUT' is visible on the side of the aircraft.

Next Steps



Other Upcoming Tasks



Study Framework

- Post updated Chapter 1 and 2 to the Project Website for TAC review
<https://2025ndsasp.com/>



System Inventory

- Continue inventory and data collection efforts
- Draft System Inventory chapter



Airport Classifications

- Finalize analysis of non-NPIAS airports for potential future NPIAS inclusion
- Draft Airport Classifications chapter



Kick-off Activity Forecasts



Kick-off System Performance



Questions?

Adam Dillin, C.M.

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